



The University of Cambridge prepares for a competitive future

Mokum collaborates on a staged approach to improve financial processes



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Customer challenge

In order to remain at the leading edge of academic excellence in a global market, the University of Cambridge needs good financial systems that meet the demands of staff, students, funding bodies and the government.

Solution

The University began a programme of improvement by upgrading its Oracle Applications. A collaborative upgrade project with Mokum put in place an up-to-date, improved solution that provides a platform for the introduction of more efficient business processes.

Key Benefits

- A stable platform for continued improvement
- Improved functionality.
- Customisations reduced by 28%.

As one of the oldest universities in the world, the University of Cambridge has an established reputation for outstanding academic achievement and high quality research in a wide range of subjects. Remaining competitive in a modern, global marketplace, however, means meeting the demands of all University stakeholders including staff, students, funding bodies, research partners and the government. Academic excellence must be backed up by sound financial systems that can respond to changing needs and the University is keen to move towards more efficient, user friendly and web-enabled applications.

The Management Information Services and Finance Divisions jointly deliver financial services to 180 departments and 1200 registered users within the University. User requirements are diverse with some departments having six or seven accountants working for them and others having just one part-time person who is not a finance specialist.

Taking a staged approach to improvement

The University had an outdated Oracle environment that was at risk of no longer being supported. It was clear that moving to the latest version of supported software would not only reduce risk, it would also resolve some existing user issues and, most importantly, provide a platform for future enhancements to both functionality and business processes.

Although the University was keen to bring greater efficiency to its users as soon as possible, it decided to avoid introducing too many changes in one go. It adopted a staged approach to improvement, starting by tackling the technical issues with its Oracle Applications.

A large, complex upgrade with user sensitivities

The challenges the University faced with its large system upgrade were further complicated by more than 300 customisations that had been made to its Oracle Applications and three areas that had always been problematic - sub-ledger security, grants management and VAT. User expectations needed to be managed sensitively because of past difficulties in these areas.

Faced with a complex task, the University looked for a partner to help with its upgrade to Oracle E-Business Suite Financials 11i. Mokum was one of 6 companies shortlisted from 26 tenders. Following a further question and answer investigation, the University asked Mokum to complete a short, high-level strategy scoping exercise.

"We needed to work with a partner who adopted a collaborative approach, kept us fully involved, worked closely with the in-house staff and transferred skills where appropriate as the project progressed," says David Sandham, Deputy Director of Management Information Services at the University of Cambridge. "We didn't want to be left with a solution we knew little about, so we decided to check out Mokum's approach. During the scoping exercise, Mokum demonstrated a clear understanding of our requirements and we worked well together."

A partner that added real value

Mokum had five people based permanently at the University for the duration of the 9 month upgrade project with additional expertise brought in as and when appropriate. Responsibilities included supporting the University database administrators in carrying out the upgrade, updating the customisations and removing or simplifying them wherever possible, helping resolve any functional issues, developing test scripts and advising on the functional impact of the upgrade. There were 570 business processes that had to be addressed and tested before the project went live.

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"The work Mokum did on our VAT rules was typical of the value they provided," adds Sandham. "We had always had issues in this area and Mokum identified and resolved a problem that our support provider had been unable to help us with. The solution was certified as a formal patch by Oracle."

Addressing the planned and unplanned

As part of the upgrade process, Mokum helped the University overcome many of the problems it had encountered with sub-ledger security. Sub-ledger security prevents one department or sub-group of users seeing the financial transactions and accounts of another. Competition in the academic world is now so fierce that even within one department there are sensitivities. One large department, for example, has 14 sub-groups that compete for research grants and don't want to share their financial information. The University's exacting requirements meant the Oracle sub-ledger security functionality had been heavily customised, making it prone to difficulties. Using native Oracle sub-ledger security functionality, it was possible to use one small customisation to replace the 15 previous ones.

When the University's Oracle Applications were first installed, the Grants Management module was not properly implemented and caused data corruption. It had been necessary to get around the problems by putting a manual solution in place to deal with invoicing and claims to project sponsors. Mokum worked with the University to both remove the data corruption and optimise the functionality provided within the Oracle Grants Management module. As a result, the University is now developing the automatic production of claims to research councils, that will be a great improvement on the current manual work-around.

As often happens on a project of this size and complexity, unexpected events and set-backs occurred. When the University's Senior Database Administrator left soon after the upgrade project started, Mokum stepped in to provide lead database administrator skills. "The database administrator skills Mokum provided were vital to the success of the project and ensured we went live on time, which is unusual in such a challenging upgrade," confirms Sandham.

Foundation for a web-enabled future

"The lack of complaints we've had from demanding users is an indication of how smoothly the upgrade has been implemented," says Sandham. "With the benefit of Mokum's experience we were able to ensure good quality user acceptance testing, training and communications. The cut-over to the new system was well planned and delivered with user expectations properly managed."

The upgrade to Oracle E-Business Suite Financials 11i means the University is now running its financial systems on a stable, supported platform. It has a much improved grants management system and the number of customisations has been cut from 313 to 228, a reduction of 28 per cent.

The biggest benefit for the University, however, is yet to come. It now has a platform for further improvement that will introduce more functionality and enable the streamlining of business processes creating greater efficiency throughout its organisation. Currently 95% of the University's suppliers are paid by cheque, for example and the new platform provides opportunities for automated BACS procedures, iProcurement and iReceivables

Continuing a successful relationship

Keen to get started on further improvements, Mokum were selected to advise on extending the functionality of the Grants module and in reviewing Cambridge custom interfaces. Further, the

University has assessed tenders to carry out a functional healthcheck of its financial systems and assess where further benefits can be gained. From nine companies, Mokum has once again been selected to carry out the work.

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About Mokum:

Mokum is an Oracle consulting and support business based in London's Docklands. Mokum offer high-quality services to large organisations that have selected Oracle as their strategic ERP system. Mokum's services include enhancements, upgrades and support encompassing all areas of the Oracle E-Business Suite.

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